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April 15, 2011

**Addendum No. 2
REQUEST FOR BEST AND FINAL OFFER
to
Request for Proposal dated January 11, 2011,
as amended February 24, 2011**

Dear Proposer:

The Metropolitan Transportation Commission (MTC) requests your firm to submit a Best and Final Offer (BAFO) to provide 511 Website Services, as described in the Request for Proposal (RFP) dated January 11, 2011, as amended February 24, 2011 by Addendum #1. Your BAFO should be based on the revisions to the RFP described in this Addendum No. 2, taking into consideration also the discussions held with MTC's evaluation panel and the list of questions provided as an attachment to this Addendum. Exceptions to the provisions in this Request for BAFO shall render proposals conditional and shall be grounds for rejection.

BAFO Format and Due Date

BAFOs shall not exceed 90-pages, excluding proposal covers, resumes, design samples and writing samples. Your BAFO must include the following:

- "Red-lined" revised proposal, with all changes to your original proposal indicated by revision text or strike-out. Please submit seven (7) bound copies and one electronic copy in Microsoft Word, Microsoft Excel and/or Adobe Acrobat pdf.
- Revised Proposal (BAFO) with all changes accepted. Please submit one (1) unbound original BAFO and one electronic copy in Microsoft Word. Cost proposals must be submitted in print and electronic Microsoft Excel versions.

You may, in addition and at your option, provide a summary of, or a key to, major substantive changes. Your BAFO should include a statement that it is a binding offer for one hundred twenty (120) days from the submission of the BAFO. Please submit your BAFO to the following address:

Barb Laurenson
Metropolitan Transportation Commission
Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, CA 94607-4700
blaure@mtc.ca.gov

**Your BAFO must be received by 12:00 p.m., PST, on Monday, May 2nd, 2011.
BAFOs received after that date and time will not be considered.**

This addendum modifies the Request for Proposal (RFP) for 511 Website Services as follows. Where text is revised, deleted text is shown in strike-through format; added text is *italicized*. There is one attachment to this addendum:

- Attachment #1: Questions

MTC has posted a red-lined version of the RFP on its website for your convenience. In the event of a discrepancy between this Addendum #2 and the red-lined RFP, this Addendum #2 takes precedence.

Item #	Location of Change	Change (<i>Addition or Deletion</i>)
1	Letter of Invitation, Contractor Selection Timetable, Page 3	Best and Final Offers due (if requested): April 19, 2011 May 2, 2011
2	III: FORM OF PROPOSAL, E. Firm Description, Key Personnel and Team Organization, Page 12	<p>Describe the firms that make up the project team and the distribution of work among them. Include descriptions of the roles of any subcontractors and their specific responsibilities and how their work will be supervised. <i>Specify the division of labor between each subcontractor and the prime contractor. Describe how your team has worked together in the past.</i></p> <p>Identify a single project manager who will have overall authority for all aspects of contract delivery.</p> <p>Identify key staff proposed to work on the project and proposed project position or title; identify the specific project tasks for which each key staff member will be responsible. For other project staff, identify by position title and give the number of personnel staffing each position. Identify the lead personnel and the number of support staff, if any, that are available for the following roles and indicate the firm for which they work. Identify which leads are key personnel and which are not. Please indicate multiple personnel if the staffing plan varies based on the task (e.g., design work through O&M versus design work through Variable Web Services or New Contractor responsibilities).</p> <ul style="list-style-type: none"> • <u>Day to day contact person for MTC for project management</u> • <u>Day to day contact person for MTC for website design issues falling under O&M (e.g., Task II.A.2 – 6)</u> • <u>Day to day contact person for MTC for website design guidance and vision falling under O&M (e.g., Tasks II.A.8 and II.A.15)</u> • <u>User experience/User interface design</u> • <u>Usability testing/focus group development & facilitation</u>

- Information architecture
- Website design
- Accessible design
- Design production
- Copywriter/Content Development
- Mobile specific development
- API development
- Development/coding
- High-level strategic visioning
- Other roles you may have identified on your team; please list (e.g., social media expert)

Identify if any staff will be located outside the San Francisco Bay Area. Summarize other known project commitments for key staff and task leads. *Identify the percentage of time key staff and task leads will be available to this project. Describe and how you will balance your commitments to other contracts to ensure proper staff resource allocation when competing needs arise. that each key personnel will have sufficient time to dedicate to this effort, including* Describe how the designated Project Manager and other members of the project management team will meet the availability requirements of the Scope of Work (e.g., for Tasks II.A.2 and II.A.4). Discuss how the team will staff up when needed to meet task needs. Identify how you will provide any needed 24/7 coverage, including scheduled non-business hour tasks and unplanned incident response support.

Provide a key personnel staffing organization chart showing lines of accountability and how communication will flow within the team and to MTC. *In addition to the chart, describe how communication will flow between members of your team and MTC and describe how you will ensure effective communication if the prime firm is not based in the San Francisco Bay Area. Explain how MTC will have access to subcontractors. Once selected, the Contractor may not change the proposed key staff or locations(s) without written approval from MTC.*

3 III:
FORM OF
PROPOSAL, F.
Qualifications and
References, Page 13

a. Paragraph 1 is amended as follows:
Describe your team's qualifications and the qualifications of the prime contractor and all key personnel (including subcontractors' personnel) as they relate to the tasks required by *Appendix A, Preliminary Scope of Work*. *Clearly identify which qualifications are for which firms on the team.* Provide sufficient detail to confirm that your team has the necessary qualifications to provide all the required services.

b. The following new paragraph is inserted between paragraphs four and five:
Describe any experience your team has had operating and maintaining a functioning website on behalf of a client. Explain which firms and personnel were involved.

4 III:
FORM OF
PROPOSAL, G.
Work Plan, Work
Plan, Page 14

a. The first paragraph of Item # 1 is amended as follows:

Provide a detailed work plan explaining how the Contractor will conduct each task identified in *Appendix A, Preliminary Scope of Work* during the contract period, August 1, 2011 to June 30, 2016. *The work plan should describe the team's approach to tasks and should not be an iteration of qualifications or past experience.* The work plan should provide sufficient detail to demonstrate a clear understanding of the task and its desired outcomes.

b. Item #1, paragraph 2, Second Bullet (Task II.A.1-6: Website Accuracy and Currency), is amended to add:

Explain how your team will meet MTC's requirement to update content and graphics within 30 minutes (Tasks II.A.2 and II.A.4) or create a new graphic with 2 hours (Task II.A.4). Explain how your team will provide depth and access, so that MTC's turn-around requirements can be met at all times.

Describe how your team will undertake routine and regular Quality Assurance and Quality Control testing and correction on websites that you develop and then manage, and how your team would approach it for 511.

Describe your team's approach to bug tracking and follow-up given that:

- *511 Transit, 511 Traffic, and the 511.org home page each have separate bug management systems already,*
- *Some website bug resolution will overlap between the front-end and back-end systems and therefore between 511*

- contractors, and*
 - *The responsibility for creating and resolving certain technical issues may be unclear between 511 contractors.*
- c. The task numbering in Item #1, paragraph 2, Bullet 3 (Task II.A.7-13: Website/Graphic Design), Bullet 4 (Task II.A.14: Information Architecture and User Interface Design), Bullet 5 (Task II.A.15: Website development, architecture, technologies, and platforms) and Bullet 6 (Task II.A.16 & 17: Technical Guidance), is amended to reflect the revised task numbering in Attachment A, Preliminary Scope of Work, as revised by this Addendum #2.
- d. Item #1, paragraph 2, Bullet 3 (Task II.A.7-13: Website/Graphic Design), is amended to add the following sentence:

Discuss how your team will be available to MTC on as-needed, yet potentially urgent, basis to support decision-making related to website content and design guidance.
- e. Item #1, paragraph 2, Bullet 5 (Task II.A.15: Website development, architecture, technologies, and platforms), is amended as follows:
 - Explain how your team will work with a range of development architecture, web technologies, and programming languages, etc. Discuss your approach to 508-compliant design and development *and how you think it may be applicable to the technology and programming languages used on 511.org and its mode sections*. Describe how you will work on collaborative teams to develop and maintain website tools using data collected by and databases managed by other parties.
- f. Item #1, paragraph 2, Bullet 6, (Task II.A.16 & 17: Technical Guidance), is amended as follows:
 - Discuss your team's approach for providing strategic website direction, *including design* and technical guidance to MTC based on analysis of usage statistics, 511 customer research data, and relevant industry trends and standards. *Explain how your team will provide website design guidance and vision and how your team will make design expertise available to MTC on as-needed, yet potentially urgent, basis.*
- g. Item #1, paragraph 2, is amended to add the following Bullets 7,

8 & 9:

- **Task II.B: Variable Web Services:** Discuss your team's approach to the following tasks which could be undertaken through Task II.B:
 - Interactive design,
 - Developing mobile web services and applications,
 - User studies - including recruiting, research, and evaluation,
 - Implementing foreign language translation on the 511.org website sections and dealing with issues you think you may run across in doing so,
 - Documenting complex systems, and
 - Content Management Systems to use for 511 in the short and long term, given that:
 - Contribute is used for the main 511.org page, and
 - A different custom CMS written by the backend developer for 511 Transit is used on Transit and contains some useful content and statistic tracking functions that have been developed over time.
- **Task II.C, Emergency Response:** Discuss your team's approach to handling emergency response during an incident (e.g., an emergency closure of the Bay Bridge, major flooding throughout multiple key corridors in the region, etc.)
- **Project Element III, New Contractor Responsibilities:** Explain your team's approach to implementing a Search function on 511.org and modal sub-sections.

5 Appendix A,
Preliminary Scope of
Work, Task II.A Web
Services and Support,
Operations and
Maintenance, Page
29

Task II.A is amended as follows:

A. ~~Operations and Maintenance~~ Ongoing Website Support

6 Appendix A,
Preliminary Scope of
Work, Task II Web
Services and Support,
Page

a. Subtask II.A.8 is amended to become Subtasks II.A.8 thru 10 as follows:

8. Maintain the 511.org Web Toolkit (<http://511.org/toolkit>).

9. Lead the overall vision for the 511.org website design framework for a customer-facing website. eCoordinate with other 511 sister pages (i.e. transit, rideshare, bicycling) to enable functional and design consistency of the 511 pages. On an on-

going basis, Recommend graphic and website design improvements to 511.org to keep the website current and fresh; to evolve 511's website design and overall brand identification; and to maintain consistency across the website. Be available to MTC staff on a daily basis to provide guidance on website content changes.

10. Through coordination with the 511 Contractors, update and design new template examples and implementation code for 511.org website components, including navigation, text boxes, buttons and tabs, forms, and tables, as necessary.

b. Tasks II.A.9 through Task II.A.15 are renumbered as Task II.A.11 through Task II.A.17.

c. Task II.A.15 is amended as follows:

~~13- 15.~~ 15. Coordinate with other 511 contractors as necessary for tool enhancement to enhance the tools on 511.org. Be proficient in the coding languages necessary to work with the 511 sister web pages in order to use code and API's from other web page suites on the 511.org page and subpages. Be proficient in accessible website design.

7 Appendix A,
Preliminary Scope of
Work, Task II.A
Ongoing Website
Support, Deliverables

The deliverables table is amended in part as follows:

II.A.9	Emails, meeting attendance and/or other communication providing recommendations and guidance	Ongoing, as needed; up to daily
II.A.10	New design templates	As needed; anticipate once a year
II.A.9_11	511 Brand Guidelines (internal and partner versions)	As needed; anticipate once a year
II.A.4_12	511 Brand Toolbox and Current library of logos, icons, and graphics	Ongoing

Deliverables II.A.11 - II.A.15 are renumbered II.A.13 – II.A.17 respectively.

8 Appendix A,
Preliminary Scope of
Work, Task II.B
Variable Web
Services, Page 32

Subtask II.B.4 is amended to add the following bullet:

- *Work collaboratively with other 511 Contractors to serve as the design, user experience and/or user research experts for new interactive features on the 511 modal pages,*

9 *Appendix A-1,
Sample Task
Description*, Page 36

a. The first sentence is amended as follows:

This sample task is provided so that proposers have an opportunity to demonstrate in detail their approach to task work and allocation of resources through development of an approach, sample scope of work, *deliverables table*, *schedule* and ~~sample~~ budget.

b. The sample task title is amended as follows:

***Sample Task: Design the Integration of the MY 511
Personalized Service throughout the 511.org Website and Design
a New MY 511 Registration.***

c. Under “Vision for My 511,”(pages 36-37), the first redesign objective is amended as follows:

Eliminate the standalone personalized *MY511* home page, and instead integrate personalized information through the 511.org website (primarily on the 511 Traffic and Transit pages, and the 511.org homepage in the near term).

d. Under “Vision for My 511,” (page 37), the “note” is amended as follows:

Note that this effort DOES NOT address how trip/map/alert saving will occur on each modal sister page. That effort is unique to the content and tools on each page and will be addressed under a separate effort. This effort also DOES NOT include the development work associated with the above design effort.

e. Under “Design Task,” (page 37), the task description is amended as follows:

~~The proposer will address the following (limit to 10 pages):~~
Design Task (limit 10 pages):

1. ~~Develop a proposed approach based on the stated objectives that describes how the proposer~~ *Based on the vision described above, describe your approach to integrating personalized information throughout the 511.org website will address the user interface design process and to identifying the optimal registration and account management process to ensure a simple, user friendly, and useful personalized service. Propose a*

process for including user testing/research (e.g., usability, focus groups) as part of the design process. *Describe the extent and processes of the user studies that would be involved. If user studies are not part of your approach, describe why.*

2. Develop a sample scope of work including assigned personnel, responsibilities, communication points, review process, milestones, deliverables and schedule. ~~The proposer would be expected to deliver the following as part of this project to provide the following deliverables:~~

- ~~a. Wireframes~~
- ~~b. Designs (.PSD files) with user interactions, such as clicks and mouse over, fully documented.~~
- ~~c. Fully functional pages (XHTML, CSS and JavaScript) with mocked data. HTML pages developed should be 508 compliant and should be cross browser compatible.~~

- a. Wireframes, designs, and fully functional pages (per the proposed SOW task description) for the new MY 511 registration process.
- b. Wireframes, designs, and fully functional pages (per the proposed SOW task description) for the new MY 511 account management process.
- c. A strategy document for migrating from the current MY 511 home page to an integrated service, with the assumption that not all modal pages would be ready to integrate personalized info at the same time and that the MY 511 home page might not be turned off immediately.
- d. Design recommendations, if appropriate, for an interim MY 511 home page.
- e. A written recommendation regarding the registration verification.
- f. Designs for integrating registration/login access points throughout the 511.org website.
- g. Designs to promote MY 511 throughout the website, if recommended.

Note that development and implementation of the design throughout the website would be covered under a SEPARATE budget effort or by other 511 contractors.

3. Define all deliverables you will provide.

4. Develop a detailed budget including how resources would be allocated, including key personnel and hourly rates. Use a format similar to that in Appendix C, Format for Development of Project Budget by Task, except change the tasks *names and numbering* as appropriate. *For example, if your Scope of Work identifies tasks 1 through 5, change the numbering from I.A, I.B, (etc.) to 1 through 5 and identify the budget for each task you have scoped.*

10 Appendix B, Rate Sheet, Page 38

The instructions for Appendix B, Rate Sheet are amended to add the following as instruction #6.

6. *Identify ALL mark-ups or fees that would be included in your fee structure (e.g., fees on other direct or direct costs; mark-ups on subcontractors, etc.).*

11 Appendix C, Project Budget by Task, Page 42

Paragraph 3 is amended as follows:

Specifically, the Project Budgets by Task must show the:

- Fully loaded staff labor-hour budgets for the tasks in Project Elements I – II and their resulting costs,
- *All direct or other direct costs associated with the tasks (including travel),*
- *Fees and/or mark-ups charged on direct or other direct costs,*
- Task-level detail as defined in the templates, and
- The budget available for Variable Web Services (Task II.B).

The remaining provisions of the RFP, dated January 11, 2011, and as amended on February 24, 2011, remain unchanged. In the event of a conflict between this addendum and the previous version(s), this addendum shall take precedence.

Any questions concerning this addendum to the RFP should be directed to Barbara Laurenson, Project Manager, at (510) 817-5849 or blaure@mtc.ca.gov.

Sincerely,



Andrew B. Fremier
Deputy Director, Operations